

Clone Record Pro Solution

Overview of the Clone Record Pro Solution:

The Clone Record professional solution allows the business user to create multiple clone records (up to 10) of existing record in just a Single Click in Microsoft D365 Customer Engagement. It supports all entities (system and custom entities).



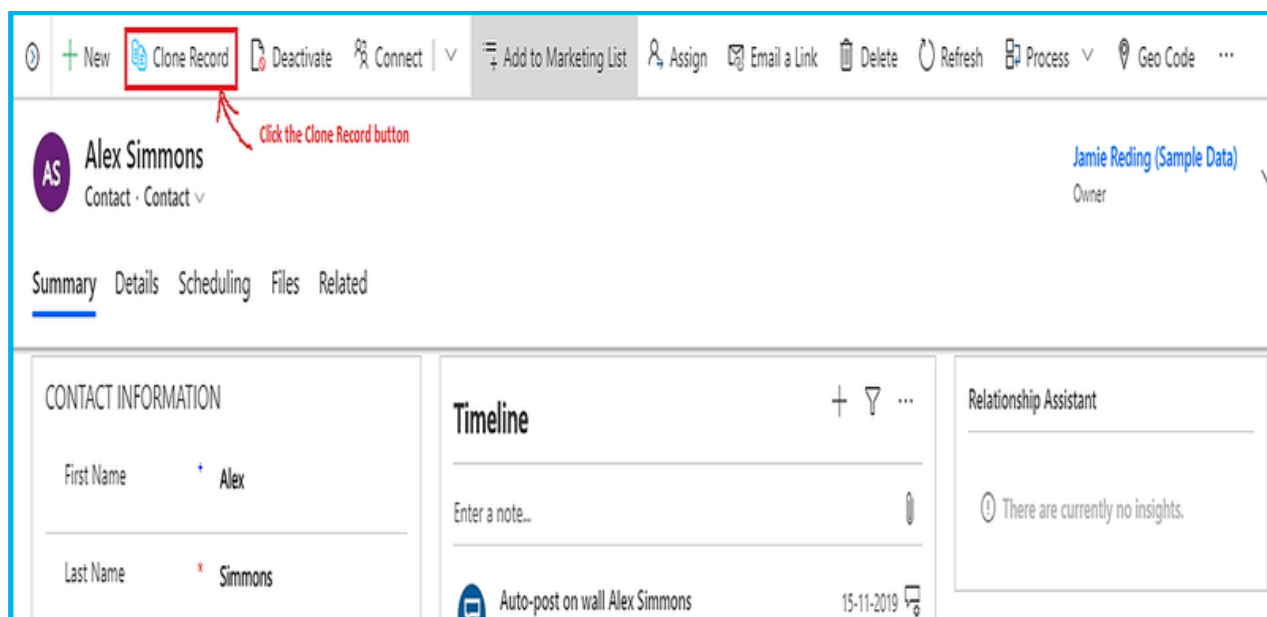
The Solution saves effort and time in manually copying and replicating the fields by any of the following commonly used methods:

1. Copy field by field from existing record to new record.
2. Export all the fields of existing record using excel, copy to new line and import the saved data file (excel) to CRM using the Import data.

The solution is intended to increase productivity for customers and users who want to clone records for specific needs in the MS D365 CRM, like Leads, Opportunities, Quotes, etc.

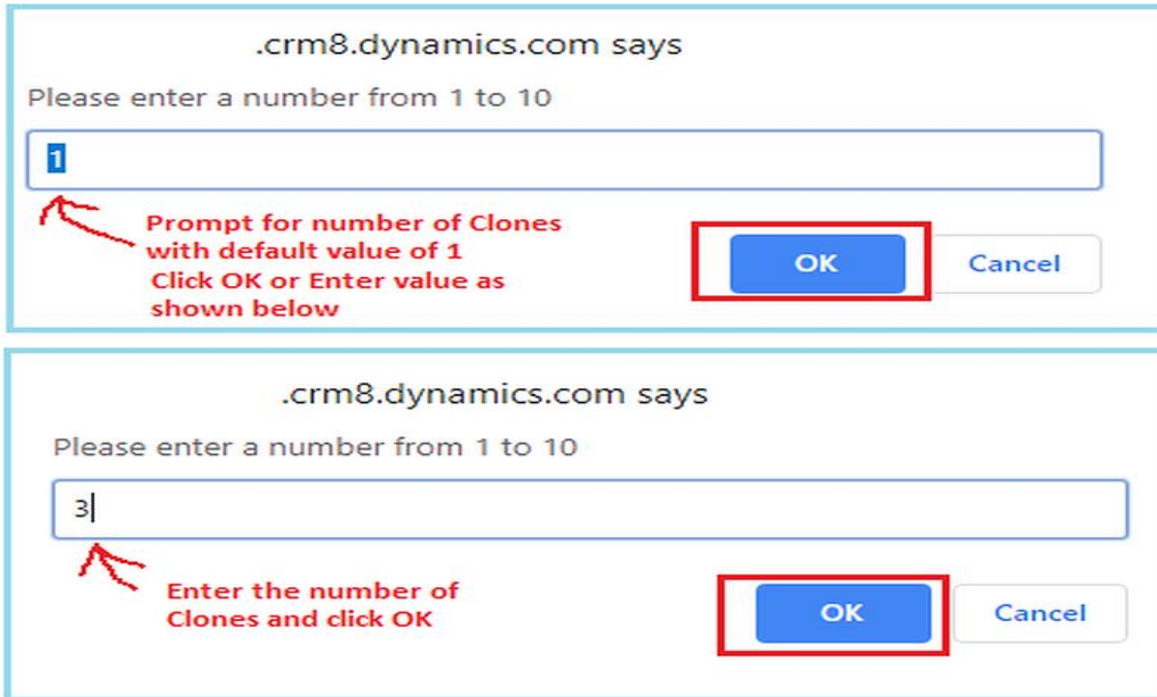
Screenshots and usage:

The Clone Record button will be available in all the entities once the solution is installed. The user needs to click on the Clone Record button.



Clone Record Pro Solution

User will be prompted with number of clones to be created, with default value set to 1 as shown in screenshot below. User to either enter the number and then click OK or click OK to create a single clone record.



.crm8.dynamics.com says

Please enter a number from 1 to 10

1

Prompt for number of Clones with default value of 1 Click OK or Enter value as shown below

OK Cancel

.crm8.dynamics.com says

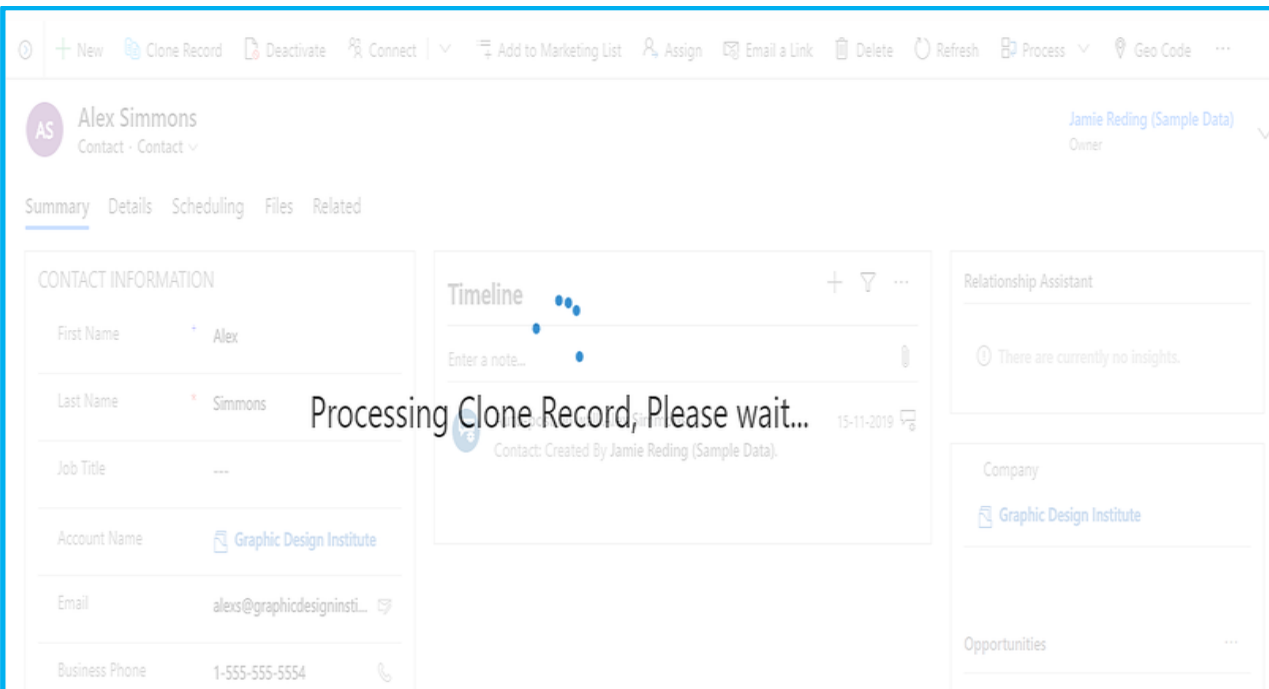
Please enter a number from 1 to 10

3

Enter the number of Clones and click OK

OK Cancel

During the processing of clone, there will be a wait message shown as below.



AS Alex Simmons
Contact · Contact v

Summary Details Scheduling Files Related

CONTACT INFORMATION

First Name * Alex

Last Name * Simmons

Job Title ---

Account Name Graphic Design Institute

Email alexs@graphicdesigninsti...

Business Phone 1-555-555-5554

Timeline

Enter a note...

Processing Clone Record, Please wait...

15-11-2019

Contact: Created By Jamie Reding (Sample Data).

Relationship Assistant

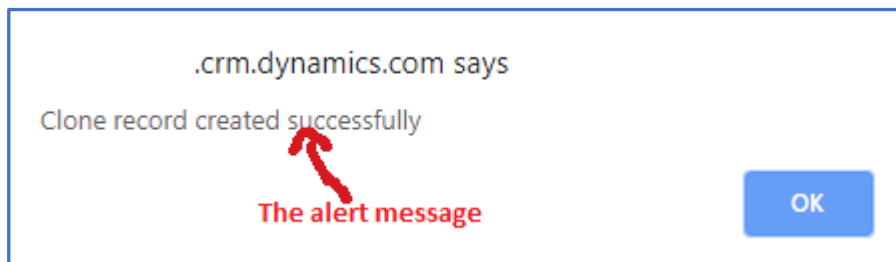
There are currently no insights.

Company

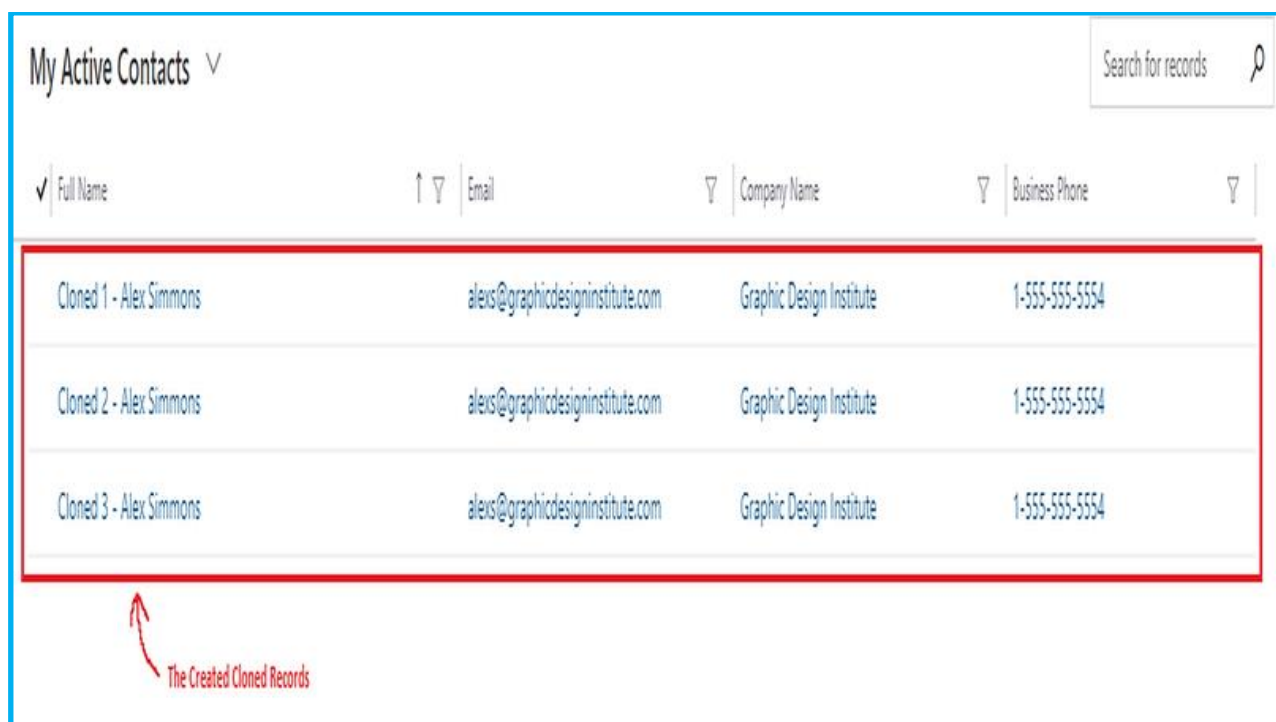
Graphic Design Institute

Opportunities

Once the clone record or records are created, a window will popup with the confirmation message to display the success message. If any error, that will also be displayed.

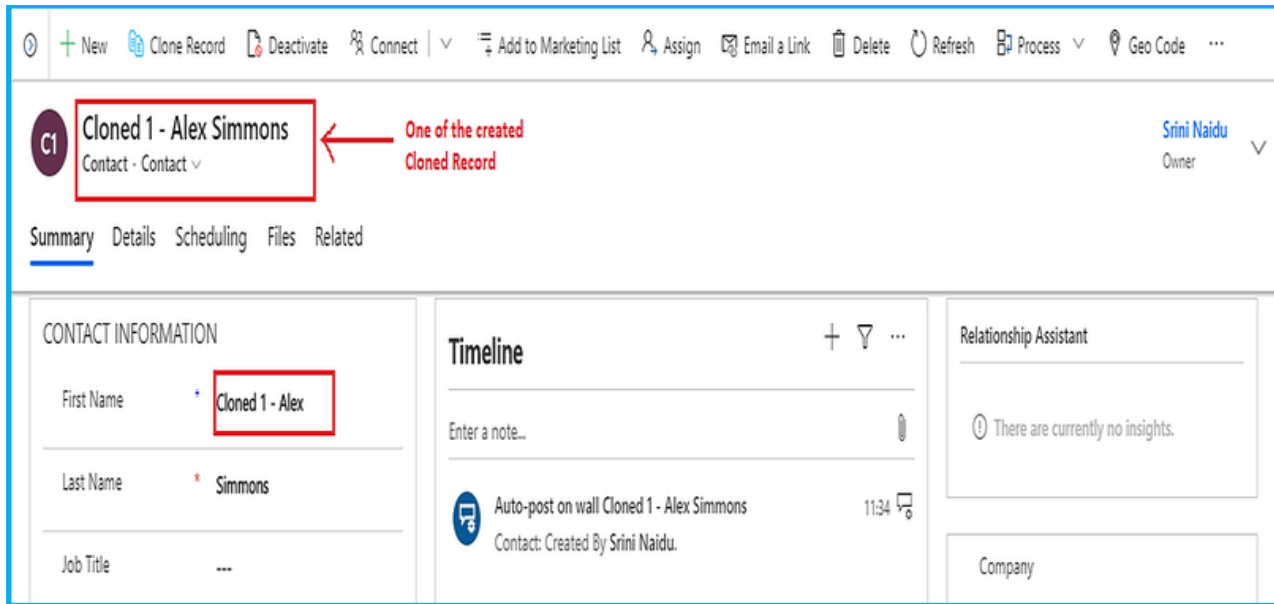


The User can navigate to My Active (Records) or Active Records and see the Cloned record(s) created.

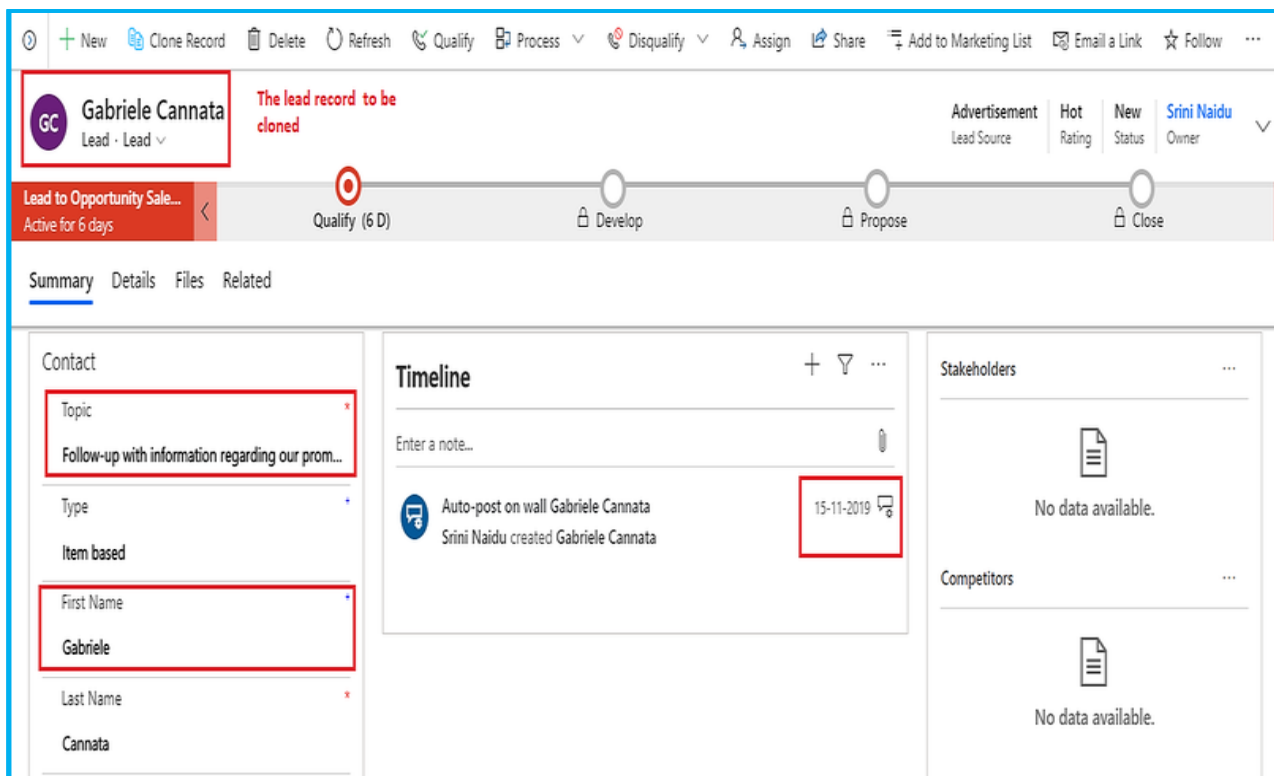


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The user can open the cloned record and start working on it.



Couple of more screenshots from other entities:



My Open Leads ▾

Cloned records created

Search for records 🔍

✓ Name	↑ Topic	Status Reason	Created On
Cloned 1 - Gabriele Cannata	Cloned 1 - Follow-up with information regardin...	New	15-11-2019 11:05
Cloned 2 - Gabriele Cannata	Cloned 2 - Follow-up with information regardin...	New	15-11-2019 11:05
Cloned 3 - Gabriele Cannata	Cloned 3 - Follow-up with information regardin...	New	15-11-2019 11:05
Cloned 4 - Gabriele Cannata	Cloned 4 - Follow-up with information regardin...	New	15-11-2019 11:05
Cloned 5 - Gabriele Cannata	Cloned 5 - Follow-up with information regardin...	New	15-11-2019 11:05
Gabriele Cannata	Follow-up with information regarding our pro...	New	21-01-2017 04:22

+ New Clone Record Delete Refresh Qualify Process Disqualify Assign Share Add to Marketing List Email a Link Follow ...

Cloned 5 - Gabriele Cannata ← One of the Lead Cloned Record

Lead - Lead ▾

Advertisement Lead Source Hot Rating New Status Sridi Naidu Owner ▾

Lead to Opportunity Sale... Active for 1 minute

Qualify (1 Min) Develop Propose Close

Summary Details Files Related

Contact

Topic

Cloned 5 - Follow-up with information regardin...

Type

Item based

First Name

Cloned 5 - Gabriele

Last Name

Cannata

Timeline

Enter a note...

Auto-post on wall Cloned 5 - Gabriele Cannata

Sridi Naidu created Cloned 5 - Gabriele Cannata

12:07

Stakeholders

No data available.

Competitors

No data available.

Dependencies:

N/A

Future Enhancements:

1. Business Process Flow will be included so that the cloned records will be at the same stage of the record used to create the clone if the entity is enabled for BPF and has a BPF.
2. Option to create associated entities at one level deeper. This will be made configurable so that it can be set by system administrators.

Example Use Cases:

- I. When creating clone account, related contacts or leads or opportunities created.
- II. When creating clone opportunity or quote or order, related opportunity products, or quote products or order products created respectively.

Known Issues:

The button does not get removed completely when the solution is un-installed. This is a known Microsoft bug reported [here](#).

Workaround:

- Export any unmanaged solution with Application ribbons added to it.
- Open customizations.xml
- Find the button/flyout you want to hide. (In our case the button is **"ps.ApplicationRibbon.{!EntityLogicalName}.CloneRecordButton.CloneRecord"**)
Instead of removing the button/flyout, go to the definition of the command for the button/flyout
- In the command definition, under Enable Rules, add
<EnableRule Id="Mscrm.Disabled" />

Ref for the workaround is provided [here](#).

Please feel free to reach out to us in case of any queries, suggestions and issues: info@pramitisoft.in